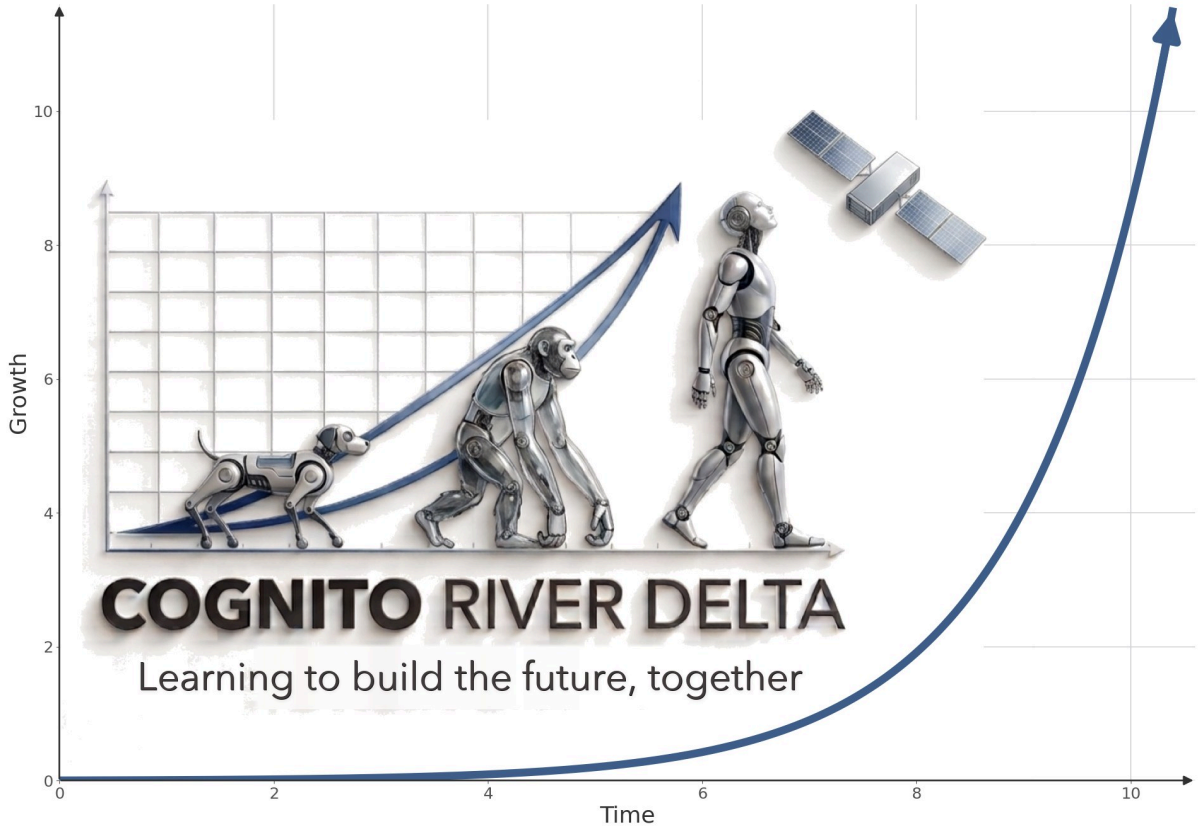


CATEGORY ROLLUP

Launch & the space economy - 2026-W46

Week of November 9, 2026

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Week of November 9, 2026 · 18 min read

Launch & the space economy

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Overview

This week marks a definitive pivot in the identity of SpaceX. For much of the last decade, the company was defined by its role as a disruptor of the launch market; however, current data suggests an aggressive rebranding from a launch provider to a vertically integrated, global infrastructure utility—specifically an AI-compute and connectivity powerhouse. The central storyline is the emergence of the "Compute-Launch Loop": SpaceX is leveraging massive Starlink revenue and its nascent AI compute leasing business to fund the hyper-capital-intensive development of Starship, which is being positioned as the essential transport layer for a new class of "orbital data centers" (StarMind) and the massive scale-up of Starlink's bandwidth.

This shift is not merely theoretical; it is manifesting in massive capital deployments. The rollout of the "Colossus 2" AI campus, targeting 1.2 million NVIDIA Blackwell GPUs, and the proposed 6-gigawatt compute complex in Arizona, signal that SpaceX's most critical battlefield may no longer be the launchpad, but the power grid and the GPU cluster. This evolution creates a profound tension between the company's cosmic ambitions—reaching Mars via Starship—and its terrestrial realities, where it must navigate the energy demands of AI, the complexities of 5G telecommunications, and a shifting political landscape in Texas and Washington. Whether SpaceX can successfully bridge these worlds—using terrestrial compute profits to subsidize orbital infrastructure—is the defining question of the current era.

SpaceX and Starship

The AI Infrastructure Pivot: From Rockets to GPUs

The most significant development this week is the sheer scale and speed of SpaceX's expansion into the AI compute sector. Moving with a velocity that traditional tech giants struggle to match, the company is activating two new supercomputer facilities by year-end: "Gun Range" in late November and "Spam" in December. The "Spam" facility is specifically configured for inference, addressing a critical component of the AI deployment cycle. The scale of this expansion is staggering: SpaceX is targeting approximately 1.2 million NVIDIA Blackwell chips for its "Colossus 2" campus by the end of the year.

This is not just about building data centers; it is about fundamentally redefining the economics of AI compute. SpaceX is reportedly employing a high-leverage "power move" in its leasing agreements, utilizing 90-day termination clauses. This allows the company to renegotiate pricing based on market spot rates, effectively turning SpaceX into a market-maker for compute and providing immense leverage over major model developers like Anthropic. This transition is already showing signs of fiscal maturity; some analysts note that SpaceX's AI segment reportedly turned a $431 million profit on $7.56 billion in revenue in Q3.

However, this expansion faces massive terrestrial hurdles, primarily centered on energy. The sheer power requirements for the Colossus 2 campus are driving SpaceX into unconventional territory. To bypass the lengthy wait times associated with traditional grid connections, the company is looking toward temporary gas turbines and Tesla Megapacks. Looking further afield, the proposed 6-gigawatt compute complex in Arizona—which would feature up to nine halls of 500,000 square feet each—represents a scale of infrastructure that will face intense public and regulatory scrutiny, with public hearings already scheduled for December 9.

The Connectivity Play: Starlink as a Mobile Carrier

Parallel to its compute ambitions, SpaceX is aggressively expanding the Starlink ecosystem into the telecommunications mainstream to challenge the established US wireless triad of AT&T, Verizon, and T-Mobile. A strategic partnership with Qualcomm is underway to build a nationwide 5G network for "Starlink Mobile." This strategy, described as a "roof and pillar" architecture, combines satellite "roof" coverage with terrestrial "pillar" base stations, with a rollout slated to begin in 2027.

The growth of the Starlink subscriber base is notable, reaching 13.6 million subscribers this week—an increase of 1.6 million in the last quarter alone. To sustain this momentum and meet

the exponential bandwidth demands of an AI-driven world, SpaceX is planning a 100-fold increase in bandwidth over the next three years. This massive requirement necessitates a major hardware upgrade cycle, potentially involving Starlink V3 and V4, which some analysts suggest could eventually generate up to $200 billion in revenue.

The Physical Linchpin: Starship and the "Double Catch"

If AI compute is the new engine of SpaceX's revenue, Starship remains the essential logistics layer. The upcoming Flight 15, targeted for November 13, is being framed as a historic milestone. SpaceX is attempting the first-ever "double catch"—using the Mechazilla tower arms to simultaneously recover both the Super Heavy booster and the Starship upper stage (Ship 42).

The success of this "double catch" is the prerequisite for the economics of the entire company. Total reusability is the "critical breakthrough" required to drive launch costs below $100/kg. Achieving this level of rapid reusability would allow SpaceX to transition from a launch provider to a high-frequency logistics utility, capable of deploying the massive hardware required for both orbital compute clusters and the eventual colonization of Mars. Consequently, there is a growing consensus that SpaceX must begin a strategic wind-down of its Falcon 9 and Crew Dragon programs to prioritize the Starship architecture.

Corporate and Financial Dynamics: The Tesla Merger and Revenue Volatility

The convergence of SpaceX and Tesla has moved from theoretical speculation to a central theme of market analysis. Discussions regarding a potential merger are reportedly active, with analysts noting significant technological overlaps in AI infrastructure, connectivity, and energy. Proponents, such as ARK Invest, suggest a merger could provide a 30% to 40% premium for Tesla, potentially using Robotaxi cash flow to fund SpaceX's massive CapEx requirements. However, the merger faces significant hurdles, including the need for a 50% shareholder vote in a company where retail ownership is reportedly under 20%, and concerns that such a deal could dilute specific milestones for Mars and robotaxis.

This corporate complexity is mirrored by extreme volatility in revenue projections. While Morgan Stanley models 2027 revenue at $175 billion, other analysts and Musk himself have floated much more aggressive targets, ranging from $500 billion to a staggering $1 trillion by 2028. This massive delta highlights the speculative nature of the current $2 trillion valuation.

Launch, Moon and Mars

While SpaceX focuses on its terrestrial infrastructure pivot, the broader race for lunar and Martian access remains a primary driver of the sector.

The Lunar Competition

The race to the Moon is intensifying, characterized by a strategic divergence between SpaceX's Starship-led approach and competitors like Blue Origin. While SpaceX is betting on a complex, multi-refueling Starship architecture, Blue Origin's potential early 2027 moon launch may leverage different engineering paths, such as the GS3 third stage. The complexity of SpaceX's requirement—which involves an estimated 22 refuelings in space to reach the Moon—remains a point of intense technical scrutiny.

Meanwhile, NASA is attempting to maintain its own technical autonomy. Administrator Jared Isaacman has outlined a roadmap to reduce reliance on external contractors, aiming for a permanent moon base with six-month crew rotations within the next decade, supported by a tiered nuclear propulsion strategy (SR1–SR4).

The Martian Logistics Framework

For Mars, the focus remains on the long-term viability of "return factories." The strategy relies on In-Situ Resource Utilization (ISRU)—specifically using the Sabatier reaction and electrolysis to manufacture methane and oxygen from Martian CO_2 and water ice. This capability is the fundamental prerequisite for any sustainable multi-planetary presence. However, even as these engineering pathways are defined, the human element remains a point of debate. While Musk claims Starship can carry 100 people to Mars, analysts suggest the usable volume per person might be as low as a "walk-in closet," significantly below the standards established by the ISS.

Cross-cutting themes

The defining connection across all subtopics this week is the **"Integrated Infrastructure Flywheel."** We are seeing the emergence of a singular, interconnected technological stack where:

1. **Starlink** provides the initial revenue and global connectivity, serving as the vital cash engine.
2. **Starship** provides the high-cadence, low-cost launch capability needed to scale Starlink's bandwidth and deploy massive AI hardware (both terrestrial and orbital).

3. **AI Compute (Terrestrial & Orbital)** provides the massive CapEx-heavy revenue stream (via GPU leasing and "Neocloud" services) that funds the continued development of Starship and the eventual Mars missions.

This creates a profound **energy-infrastructure dependency**. The success of SpaceX's AI ambitions is inextricably linked to its ability to secure massive amounts of terrestrial power—as evidenced by the scale of the Arizona and Memphis/Mississippi developments. This dependency creates a strategic incentive for "StarMind": the concept of moving compute to orbit to bypass terrestrial constraints. Consequently, the "Launch" sector is no longer just about rockets; it is about the capacity to move the physical building blocks—chips, power, and connectivity—of the global AI economy.

Where sources agree

- **The Pivot to AI Infrastructure:** There is a broad consensus among analysts (Ars Technica, Goldberg, Carbutt, Wissner-Gross) that SpaceX is evolving from a launch company into a superintelligence infrastructure giant.
- **Reusability as the Economic Driver:** Sources agree that total reusability, specifically through mechanisms like the "double catch," is the essential threshold for lowering launch costs to the levels required for a multi-planetary economy.
- **Starlink's Strategic Necessity:** There is consensus that Starlink's revenue and bandwidth scaling are the primary engines that will fund the "upmass" capabilities of Starship.
- **Political/Regulatory Risk:** There is significant consensus that political shifts—specifically Democratic gains in the U.S. midterms and shifts in Texas politics (e.g., the election of Governor Gina Hinojosa)—represent a significant new "final constraint" for data center and launch expansion.

Where sources disagree

- **Revenue Projections:** There is an enormous gap in financial modeling. Estimates for SpaceX's future revenue range from Morgan Stanley's $175 billion (2027) to ARK's $1 trillion (2028), to Peter Diamandis's quadrillion-dollar long-term vision.
- **Orbital Compute Feasibility:** A technical debate is brewing. Astrophysicist Joseph Farah argues that thermodynamics and solar area requirements make orbital data centers

impractical. Conversely, other analysts argue that falling Starship launch costs will eventually make orbital compute cheaper than terrestrial options due to cooling efficiencies.

- **The Tesla/SpaceX Merger:** Analysts are split on the impact. Some see it as a "floor" for Tesla's stock (Barclays), while others view it as an "overhang" that could dilute specific milestones or use lower-multiple SpaceX stock (Gary Black).
- **The Moon Timeline:** There is disagreement over who will arrive first, with Brian Wang suggesting Blue Origin could beat SpaceX to the moon due to the extreme complexity of Starship's refueling requirements.
- **Telecom Competition:** While some posit Starlink could "wipe the slate" of traditional carriers, industry experts (like the CEO of Deutsche Telekom) argue the cost of competing in mobile could reach $200 billion.

Numbers and claims to verify

- **$1.25 billion/month:** The reported payment from Anthropic to SpaceX for compute (Farzad Mesbahi/Steven Mark Ryan).
- **$14 billion:** SpaceX's reportedly first profitable quarter (Randy Kirk).
- **$1 trillion:** The 2028 revenue target cited by ARK (Musk claim).
- **1.2 million:** The target number of NVIDIA Blackwell chips for Colossus 2 (Elon Musk).
- **22 times:** The number of space refuelings required for a Starship Moon mission (Jalopnik).
- **6 gigawatts:** The capacity of the proposed Arizona compute complex (Jo Bhakdi/Steven Mark Ryan).
- **$10 per kilogram:** The launch cost target required for Starship success (ARK).

Investment and strategic implications

- **The "Free Capex" Model:** If SpaceX can successfully lease compute to AI labs at high margins (facilitated by their 90-day lease clause), they may create a self-funding cycle where AI revenues pay back massive infrastructure investments within 6 to 9 months (Brighter with Herbert).
- **Vertical Integration as a Moat:** SpaceX is building a moat that is not just in space, but in the physical layer of AI (chips, power, connectivity, and transport). This makes them a

primary beneficiary of the AI boom, regardless of which specific LLM wins the market. Furthermore, Tesla's "TerraFab" development suggests a push toward in-house chip manufacturing to reduce iteration cycles.

- **Regulatory Hedging:** Moving compute to orbit (StarMind) functions as a long-term regulatory hedge. If terrestrial zoning, energy moratoriums, or political opposition become insurmountable, SpaceX may have the only viable path to scaling AI infrastructure.
- **Tesla Synergy:** For investors, the potential Tesla/SpaceX merger represents a pivot toward "Physical AI"—the convergence of robotics (Optimus), autonomy (FSD), and orbital logistics.
- **Energy Opportunity:** There is a significant revenue opportunity for Tesla Energy if SpaceX proceeds with its massive compute-driven energy needs, such as the potential supply of 4,800 Megapacks for the Arizona site.

What to watch next week

- **Starship Flight 15 (Target: Nov 13):** The outcome of the "double catch" attempt will be the single most important technical indicator for the company's long-term economics and its ability to reach the $100/kg target.
- **Arizona Compute Complex Hearings (Dec 9):** Watch for early indications of the political and local opposition SpaceX will face in its terrestrial expansion.
- **Post-Midterm Market Volatility:** Monitor how the political shift in the U.S. and Texas affects the valuation and regulatory outlook for Musk's integrated ecosystem.

Appendix: Individual perspectives

We see further because we stand on the shoulders of giants. The people in this appendix are some of those giants: their public work, followed and studied every day and every week, is how CognitoRiverDelta brings the world's AI knowledge and concerns together, so that, in time, our expert panel can help shape real solutions and paths forward for all of us. We learn by observing them, and we think of them as kindred spirits: people helping humanity and AI educate each other and contribute to solutions. Together they form a much larger community of minds, a worldwide panel; ours is a small copy of it. Most people don't want to become expert kayakers, reading rocks and rapids every day; yet that is how this fast-flowing river of

change feels to many of us, and the evidence that could ease those fears, the grounded ones and the imagined ones, is still being gathered. That is the work. We credit their ideas here with gratitude; they are not affiliated with us and do not endorse this report.

(All perspectives are summarized from the provided weekly notes)

- **Aaron Burnett**: Views Starship as the essential logistics layer for scaling Starlink's bandwidth and orbital compute.
- **Ben Thompson**: Sees SpaceX as a potential facilitator of space-based data centers; warns of political constraints on AI.
- **Brian Wang**: Views Starship as a "brute force" architecture to scale infrastructure; notes Blue Origin's potential lunar advantage.
- **Brian White**: Highlights the necessity of Starship to deploy hardware required for Starlink to compete with terrestrial fiber.
- **Cathie Wood (ARK)**: Highly bullish on the Tesla-SpaceX merger and a $28.5 trillion orbital compute market.
- **Cern Basher**: Sees SpaceX's strategy as a multi-domain integration of space, terrestrial robotics, and autonomous networks.
- **David Carbutt**: Focuses on the transition to a superintelligence infrastructure giant and the profitability of the AI segment.
- **Dr. Alex Wissner-Gross**: Views Starship as a way to bypass terrestrial regulatory and energy constraints via orbital compute.
- **Elon Musk**: Emphasizes 100% reusability and the transition to Starship as a functional orbital payload carrier.
- **Ezra Klein**: Warns of the systemic risks created by the government's increasing dependency on Musk's companies.
- **Farzad Mesbahi**: Views SpaceX as a vertical industrial flywheel; emphasizes the "return factory" strategy for Mars.
- **Gwynne Shotwell**: Defines SpaceX as an AI-centric business leveraging orbital compute, mobile infrastructure, and Starship.
- **Herbert Ong**: Sees a shift from physical construction to an aggressive revenue-scaling phase driven by orbital data centers.
- **Jeff Lutz**: Analyzes SpaceX as a capital-intensive cloud vendor rather than just a launch provider.
- **Jo Bhakdi**: Maintains a long-term bullish view on orbital compute despite thermodynamic challenges.

- **Larry Goldberg**: Projects massive valuations based on Starlink and space-based data center revenue.
- **Nick Gibbs**: Projects massive Neocloud revenue and views the $2 trillion valuation as contingent on proven profit.
- **Peter Diamandis**: Sees a quadrillion-dollar potential if SpaceX executes its mission at exponential speed.
- **Phil Beisel**: Notes that Tesla's autonomy currently has a deeper moat than SpaceX's launches, but expects a merger.
- **Randy Kirk**: Anticipates massive value growth driven by 10-13 GW of compute and 5G deployment.
- **Ron Baron**: Projects massive valuations based on Starlink and space-based data center revenue.
- **Steven Mark Ryan**: Highlights SpaceX's leverage over AI labs via the 90-day compute lease clause.

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This week marks a definitive pivot point in the history of the space economy, signaling a transition from the era of "orbital access" to the era of "orbital infrastructure." The headline event was Starship Flight 14, whi

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